

OCCLC Access & Authorization Web Form Screenshots and Instructions for BIBCO Libraries

<https://www.oclc.org/app/sysacc/header.pl>

If the link above does not work please go to <http://oclc.org/toolbox.en.html> and choose the link there for Access and Authorization under Forms in the left hand column

These slides are in 2 groups.

The first group [Slides 3-9] covers when an existing authorization is being changed for whatever reason (e.g. change password, change operator name, etc.).

The second group [Slides 10-16] covers when an entirely new authorization needs to be set-up (e.g. for a new hire, etc.).

These slides are illustrative only

When you fill out the webform please include your name and institution information.

If you have any questions please write to enhance@oclc.org

If you need help filling out the webform please contact OCLC Support:

<https://www.oclc.org/support/contact-support.en.html>

1st Screen – Change Existing Authorization

Please fill in the blanks with your institution or Funnel information; all fields on this screen are required as denoted by * [this is true throughout the web form]



OCLC Access & Authorization

Please use this form to add/change/delete authorizations for **Cataloging (including Local Holdings Maintenance), ILL, and WorldCat Selection.**

This form should not be used for CatExpress, Reference Service or WebDewey Service authorizations. To request information about these services, please contact your OCLC regional service provider.

[Contáctenos: Para hablar en español.](#)

[PDF Version](#)

*Contact Person

*Institution Name

*OCLC Billing Partner

*OCLC Symbol

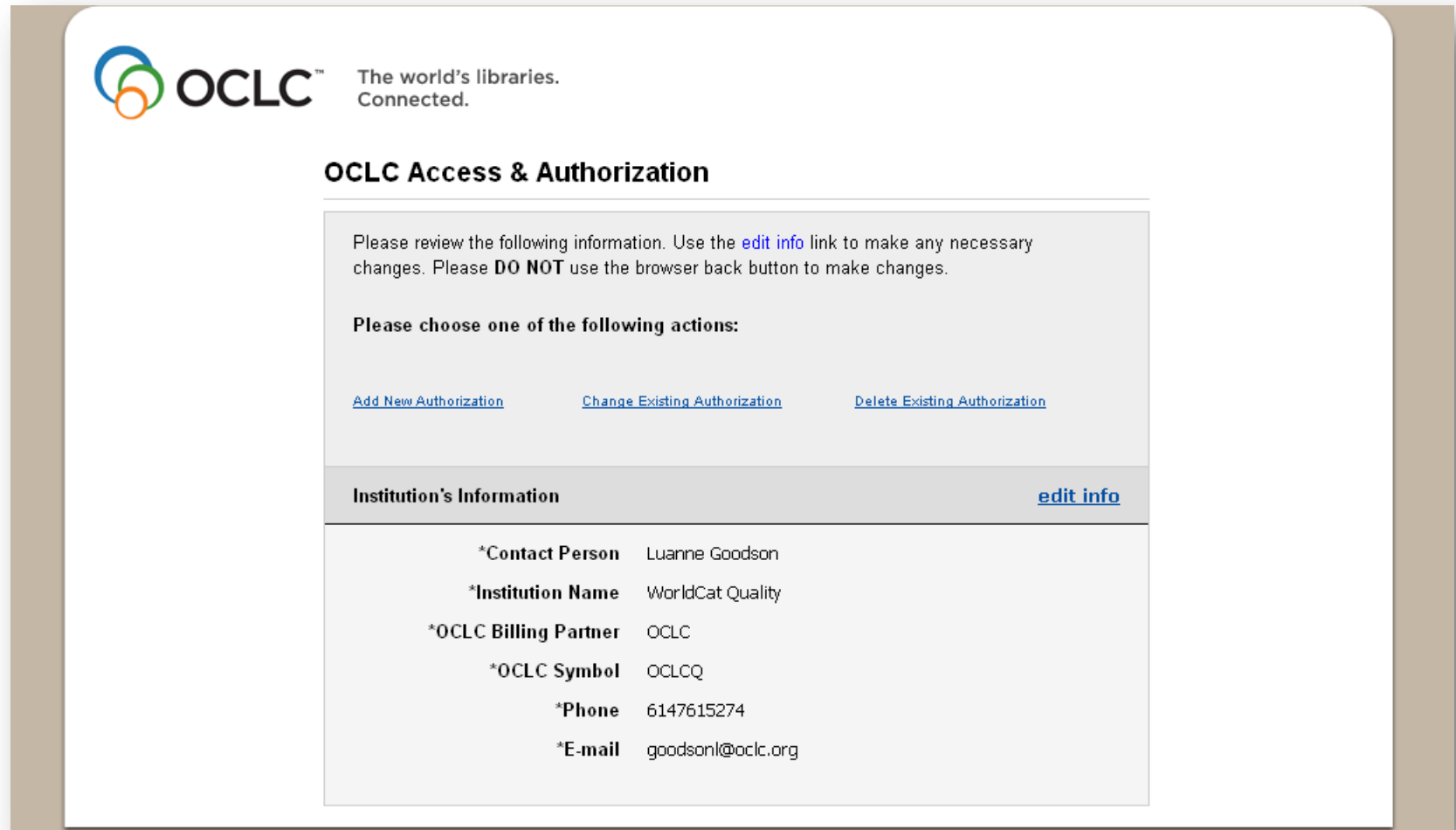
*Phone

*E-mail

Next >>

2nd Screen – Change Existing Authorization

For this example Choose the Hotlink in the center that reads
[Change Existing Authorization](#)



The screenshot displays the OCLC Access & Authorization interface. At the top left is the OCLC logo with the tagline 'The world's libraries. Connected.' Below this, the title 'OCLC Access & Authorization' is centered. A gray box contains instructions: 'Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.' Below the instructions, a section titled 'Please choose one of the following actions:' contains three blue underlined links: 'Add New Authorization', 'Change Existing Authorization', and 'Delete Existing Authorization'. The 'Change Existing Authorization' link is highlighted. Below this is a section titled 'Institution's Information' with an 'edit info' link on the right. The information is presented in a list format with labels and values.

OCLC Access & Authorization

Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.

Please choose one of the following actions:

[Add New Authorization](#) [Change Existing Authorization](#) [Delete Existing Authorization](#)

Institution's Information [edit info](#)

| | |
|-----------------------|-------------------|
| *Contact Person | Luanne Goodson |
| *Institution Name | WorldCat Quality |
| *OCLC Billing Partner | OCLC |
| *OCLC Symbol | OCLCQ |
| *Phone | 6147615274 |
| *E-mail | goodsonl@oclc.org |

OCLC Access & Authorization

3rd Screen – Change Existing Authorization

Provide the Authorization Number to which you wish to have changes applied; otherwise only the Default Service need be selected [e.g. Cataloging (Includes Local Holdings Maintenance)]

The screenshot shows the OCLC Access & Authorization interface. At the top left is the OCLC logo with the tagline 'The world's libraries. Connected.' Below this is the title 'OCLC Access & Authorization'. The main form area is titled 'Change Existing Authorization'. It contains a field for '*Authorization Number' with the value '100236959'. Below this is a section 'Change which option(s):' with two sub-sections: 'Default Service:' and 'Secondary Services:'. Under 'Default Service:', there are three radio button options: 'Cataloging (Includes Local Holdings Maintenance)' (selected), 'ILL', and 'WorldCat Selection'. Under 'Secondary Services:', there is a heading 'Please select any options that apply:' followed by three checkbox options: 'Cataloging', 'ILL', and 'WorldCat Selection'. Below these is a section '(and/or any of the following)' with three checkbox options: 'Change Operator Name', 'Change Logon Greeting', and 'Change Password'. At the bottom of the form are three buttons: '<< Go Back', 'Reset', and 'Next >>'.

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OCLC Access & Authorization

Change Existing Authorization

*Authorization Number

Change which option(s):

Default Service:

- ☒ Cataloging (Includes Local Holdings Maintenance)
- ☐ ILL
- ☐ WorldCat Selection

Secondary Services:

Please select any options that apply:

- ☐ Cataloging
- ☐ ILL
- ☐ WorldCat Selection

(and/or any of the following)

- ☐ Change Operator Name
- ☐ Change Logon Greeting
- ☐ Change Password

[<< Go Back](#) [Reset](#) [Next >>](#)

4th Screen – Change Existing Authorization

BIBCO libraries: under Cataloging Service Options from the pull-down menu below Cataloging Service Mode be sure to choose ENN—Enhance (National). When you do a new area opens up: Authorized Formats, you must select which formats your library needs applied. Then enter your library's MARC Organization Code in the Special Instructions box (codes can be found here: <http://www.loc.gov/marc/organizations/orgshome.html>)

OCLC Access & Authorization

Change Existing Authorization

*Authorization Number: 100-236-959

Default Service: Cataloging Service

For current WebDewey subscribers only:

☐ Include WebDewey access with this Cataloging authorization.

Cataloging Service Options [\(see Description of modes\)](#):

Cataloging Service Mode

Local Holdings Maintenance Level

ENN--Enhance (National) ▼

Select one: ▼

Note: The Local Holdings Maintenance (LHM) Level will automatically be chosen based on your Cataloging Service Mode; you have the option to change the default LHM Level if appropriate.

Authorized Formats: (Use with ENH or ENN Cataloging only. [Description of Formats](#))
Your institution must be approved for Enhanced status)

Select all that apply:

- | | |
|--|--|
| <input checked="" type="checkbox"/> BKS--Books | <input type="checkbox"/> MIX--Mixed Materials Format |
| <input type="checkbox"/> COM--Computer Files | <input type="checkbox"/> REC--Sound Recordings |
| <input type="checkbox"/> SCO--Scores | <input type="checkbox"/> VIS--Visual Materials |
| <input type="checkbox"/> MAP--Maps | |

- | | |
|--|---|
| <input type="checkbox"/> (082, 092) | <input type="checkbox"/> Medicine (060, 096, 069) |
| <input type="checkbox"/> GOV--Government Documents (086, 074, 037) | <input type="checkbox"/> UDC--Universal Decimal Class (080) |
| <input type="checkbox"/> LC--Library of Congress (050, 090) | |

Subject Headings: (Cataloging only)

[Description of Headings](#)

Default Subject Heading

Select one: ▼

Additional Subject Headings

Select all that apply:

- | | |
|--|--|
| <input type="checkbox"/> LC--Library of Congress (2d ind. 0) | <input type="checkbox"/> NLC/E--National Library of Canada/English (2d ind. 5) |
| <input type="checkbox"/> LC/AC--Library of Congress/Annotated Card (2d ind. 1) | <input type="checkbox"/> NLC/F--National Library of Canada/French (2d ind. 6) |
| <input type="checkbox"/> LOCAL--Local Class number (field 699) | <input type="checkbox"/> OTHER--Other (2d ind. 7) |
| <input type="checkbox"/> MESH--Medical (2d ind. 2) | <input type="checkbox"/> SEARS--Sears (2d ind. 8) |
| <input type="checkbox"/> NAL--National Agriculture Library (2d ind. 3) | |

Special Instructions

(if applying for NACO authorization please provide your institution's MARC21 Organization Code)

OCLC

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OCLC Access & Authorization

5th Screen- Change Existing Authorization

This is simply a Review option – you must click the **Add Request** button to go to the final screen

OCLC Access & Authorization

Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.

If the following information is correct, add the request to the order by clicking on the [add request](#) button. **NOTE:** You will have an opportunity to cancel this order on the following page.

Institution's Information

[edit info](#)

*Contact Person Luanne Goodson
*Institution Name OCLC
*OCLC Billing Partner OCLC
*OCLC Symbol OCLCQ
*Phone 6147615274
*E-mail goodsonl@oclc.org

Change Authorization

[edit info](#)

*Authorization Number 100-236-959
*Default Service Cataloging Service
Cataloging Service Mode< ENIN--Enhance (National)
Local Holdings Maintenance Level
Authorized Formats BKS--Books
Default Classification Scheme
Additional Classification Schemes .
Default Subject Heading
Additional Subject Headings .
Special Instructions OCoLC
(if applying for NACO
authorization please provide your
institution's MARC21
Organization Code)

Add Request

6th Screen – Change Existing Authorization

Please note: your request will
not go to OCLC *until*

Submit Order is chosen on this screen



Your request has been added to this order.

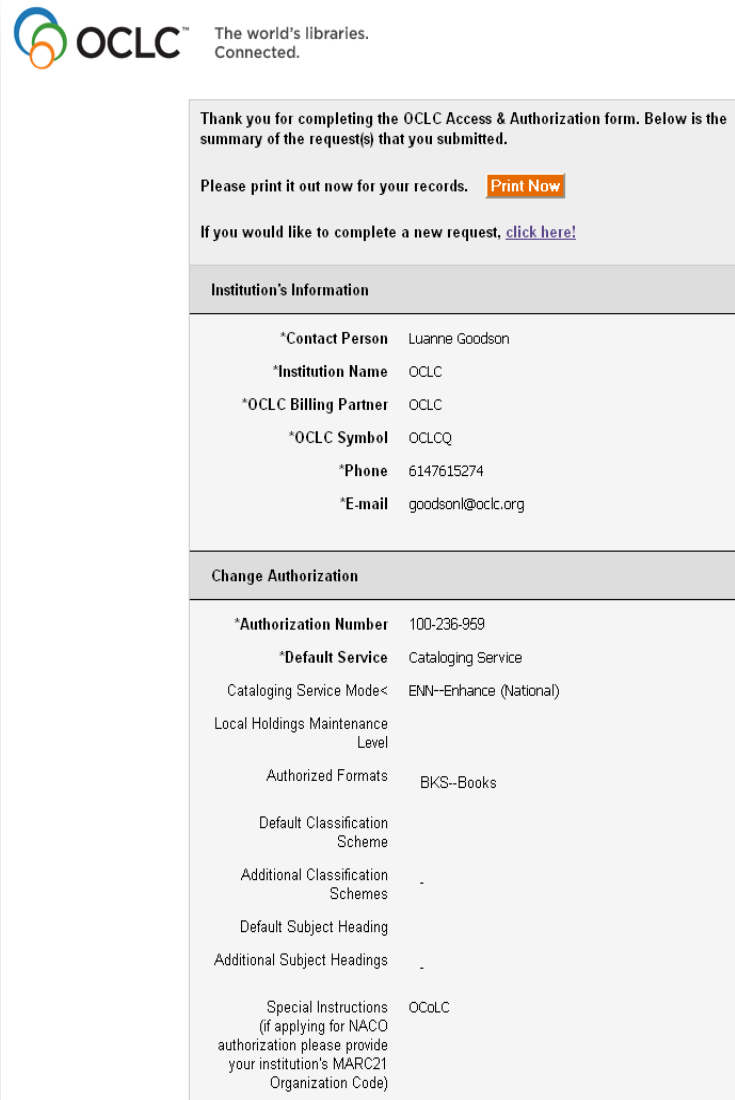
Add Another Request


Submit Order

Cancel Order

After you choose Submit Order a confirmation screen will appear, like below – this is the **FINAL screen**. Please save an electronic version on your computer in case there should be any trouble with transmission.

OCLC Order Services staff normally turn these around in a matter of days, at which point an email is sent to the person whose contact information was included at the beginning of the form. If an email is not received after 7 business days, please send the electronic version you saved on your computer to enhance@oclc.org and we will process it from there.



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Connected.

Thank you for completing the OCLC Access & Authorization form. Below is the summary of the request(s) that you submitted.

Please print it out now for your records. [Print Now](#)

If you would like to complete a new request, [click here!](#)

| Institution's Information | |
|---------------------------|-------------------|
| *Contact Person | Luanne Goodson |
| *Institution Name | OCLC |
| *OCLC Billing Partner | OCLC |
| *OCLC Symbol | OCLCQ |
| *Phone | 6147615274 |
| *E-mail | goodsonl@oclc.org |

| Change Authorization | |
|--|-------------------------|
| *Authorization Number | 100-236-959 |
| *Default Service | Cataloging Service |
| Cataloging Service Mode | ENN--Enhance (National) |
| Local Holdings Maintenance Level | |
| Authorized Formats | BKS--Books |
| Default Classification Scheme | |
| Additional Classification Schemes | . |
| Default Subject Heading | |
| Additional Subject Headings | . |
| Special Instructions (if applying for NACO authorization please provide your institution's MARC21 Organization Code) | OCLC |

1st Screen – Add New Authorization

Please fill in the blanks with your institution or Funnel information; all fields on this screen are required as denoted by * [this is true throughout the web form]



OCCL Access & Authorization

Please use this form to add/change/delete authorizations for **Cataloging (including Local Holdings Maintenance), ILL, and WorldCat Selection.**

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[Contáctenos: Para hablar en español.](#)

[PDF Version](#)

*Contact Person

*Institution Name

*OCCL Billing Partner

*OCCL Symbol

*Phone

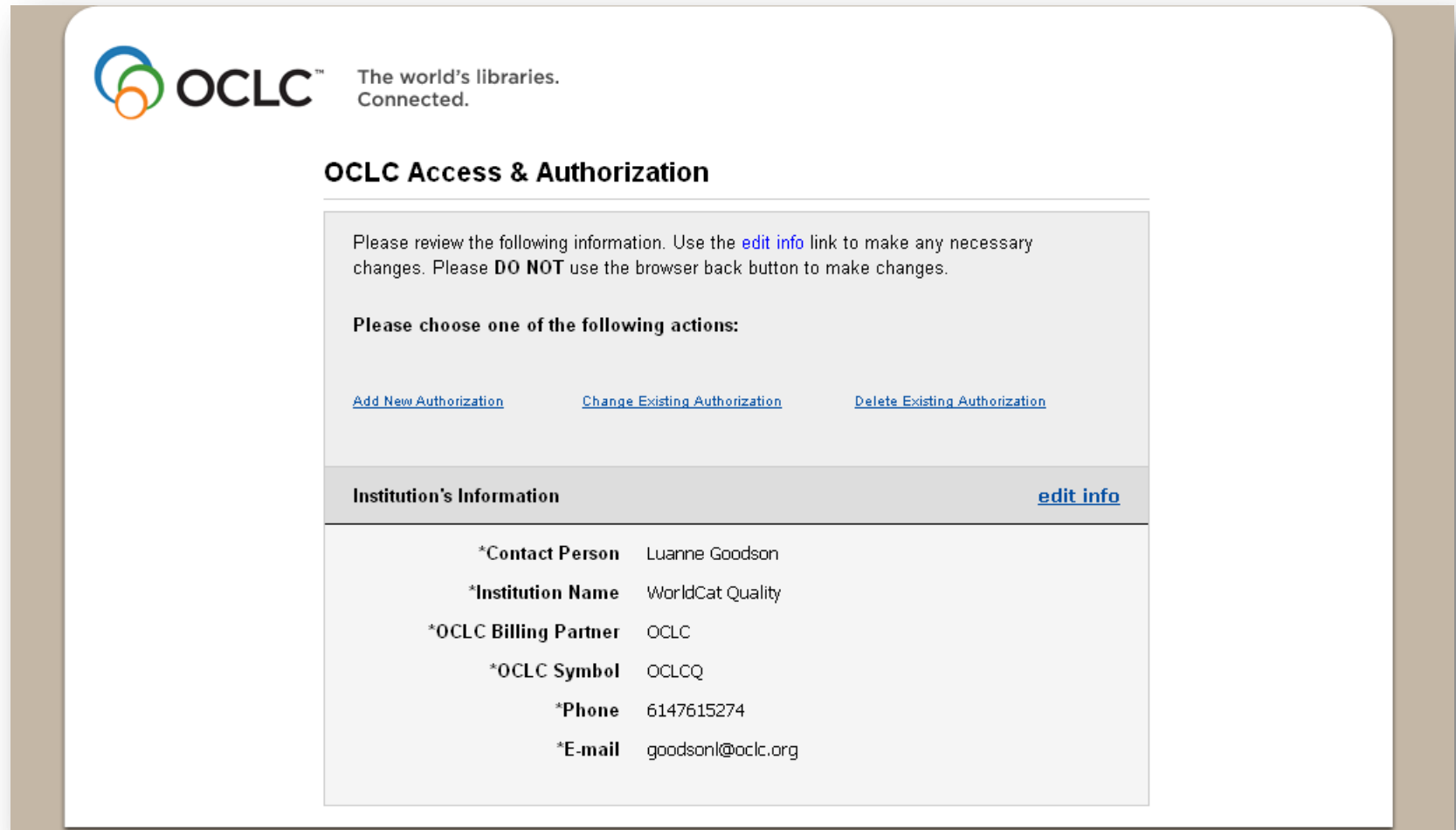
*E-mail

Next >>

2nd Screen – Add Existing Authorization

For this example Choose the Hotlink in the center that reads

[Add New Authorization](#)



The screenshot displays the OCLC Access & Authorization interface. At the top left is the OCLC logo with the tagline 'The world's libraries. Connected.' Below this, the title 'OCLC Access & Authorization' is centered. A gray box contains instructions: 'Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.' Below the instructions, a prompt reads 'Please choose one of the following actions:' followed by three links: [Add New Authorization](#), [Change Existing Authorization](#), and [Delete Existing Authorization](#). The 'Add New Authorization' link is highlighted. Below the links is a section titled 'Institution's Information' with an [edit info](#) link. This section contains a list of fields and their values: *Contact Person (Luanne Goodson), *Institution Name (WorldCat Quality), *OCLC Billing Partner (OCLC), *OCLC Symbol (OCLCQ), *Phone (6147615274), and *E-mail (goodsonl@oclc.org).

OCLC Access & Authorization

Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.

Please choose one of the following actions:

[Add New Authorization](#) [Change Existing Authorization](#) [Delete Existing Authorization](#)

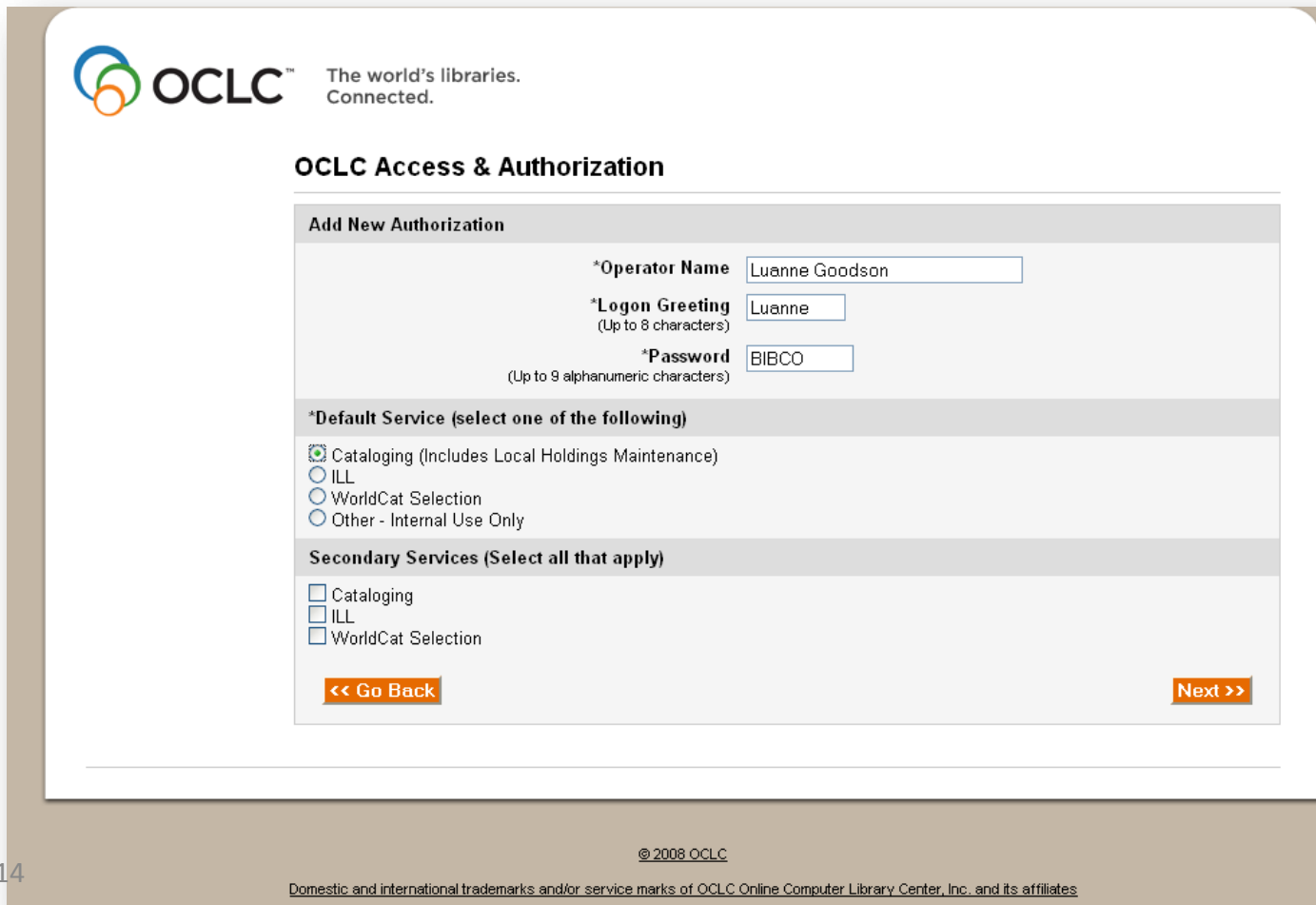
Institution's Information [edit info](#)

| | |
|-----------------------|-------------------|
| *Contact Person | Luanne Goodson |
| *Institution Name | WorldCat Quality |
| *OCLC Billing Partner | OCLC |
| *OCLC Symbol | OCLCQ |
| *Phone | 6147615274 |
| *E-mail | goodsonl@oclc.org |

OCLC Access & Authorization

3rd Screen – Add New Authorization

This option is for an entirely new number
[in most cases the level can simply be changed to an existing number e.g. from FUL to ENN]



The screenshot shows the OCLC Access & Authorization interface. At the top left is the OCLC logo with the tagline 'The world's libraries. Connected.' Below this is the title 'OCLC Access & Authorization'. The main section is titled 'Add New Authorization' and contains several input fields and selection options. The fields are: '*Operator Name' with the value 'Luanne Goodson', '*Logon Greeting' with the value 'Luanne' (noted as up to 8 characters), and '*Password' with the value 'BIBCO' (noted as up to 9 alphanumeric characters). Below these is a section for '*Default Service (select one of the following)' with radio button options: 'Cataloging (Includes Local Holdings Maintenance)' (selected), 'ILL', 'WorldCat Selection', and 'Other - Internal Use Only'. The next section is 'Secondary Services (Select all that apply)' with checkboxes for 'Cataloging', 'ILL', and 'WorldCat Selection'. At the bottom are two orange buttons: '<< Go Back' and 'Next >>'. The footer of the page includes the date 'May 8, 2014', the copyright '© 2008 OCLC', and a disclaimer about trademarks.

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OCLC Access & Authorization

Add New Authorization

*Operator Name

*Logon Greeting
(Up to 8 characters)

*Password
(Up to 9 alphanumeric characters)

*Default Service (select one of the following)

☒ Cataloging (Includes Local Holdings Maintenance)

☐ ILL

☐ WorldCat Selection

☐ Other - Internal Use Only

Secondary Services (Select all that apply)

☐ Cataloging

☐ ILL

☐ WorldCat Selection

<< Go Back Next >>

May 8, 2014

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OCLC Access & Authorization

4th Screen – Add New Authorization

OCLC Access & Authorization

Add New Authorization

*Operator Name: Luanne Goodson

*Logon Greeting: Luanne

*Password: BIBCO

*Default Service: Cataloging Service

For current WebDewey subscribers only:

☐ Include WebDewey access with this Cataloging authorization.

Cataloging Service Options ([see Description of modes](#)):

*Cataloging Service Mode Local Holdings Maintenance Level

ENN--Enhance (National) Select one:

Note: The Local Holdings Maintenance (LHM) Level will automatically be chosen based on your Cataloging Service Mode; you have the option to change the default LHM Level if appropriate.

Authorized Formats: (Use with ENH or ENN Cataloging only. [Description of Formats](#)
Your institution must be approved for Enhanced status)

Select all that apply:

- | | |
|--|--|
| <input checked="" type="checkbox"/> BKS--Books | <input type="checkbox"/> MIX--Mixed Materials Format |
| <input type="checkbox"/> COM--Computer Files | <input type="checkbox"/> REC--Sound Recordings |
| <input type="checkbox"/> SCO--Scores | <input type="checkbox"/> VIS--Visual Materials |
| <input type="checkbox"/> MAP--Maps | |

Additional Classification Schemes

Select all that apply:

- | | |
|---|--|
| <input type="checkbox"/> CAN--Call Number/Class Number assigned in Canada (055) | <input type="checkbox"/> NAL--National Agricultural Library (070, 072) |
| <input type="checkbox"/> DEW--Dewey Decimal System (082, 092) | <input type="checkbox"/> NLM--National Library of Medicine (060, 096, 069) |
| <input type="checkbox"/> GOV--Government Documents (086, 074, 037) | <input type="checkbox"/> UDC--Universal Decimal Class (080) |
| <input type="checkbox"/> LC--Library of Congress (050, 090) | |

Subject Headings: (Cataloging only)

[Description of Headings](#)

*Default Subject Heading

SEARS--Sears (2d ind. 8)

Additional Subject Headings

Select all that apply:

- | | |
|--|--|
| <input type="checkbox"/> LC--Library of Congress (2d ind. 0) | <input type="checkbox"/> NLC/E--National Library of Canada/English (2d ind. 5) |
| <input type="checkbox"/> LC/AC--Library of Congress/Annotated Card (2d ind. 1) | <input type="checkbox"/> NLC/F--National Library of Canada/French (2d ind. 6) |
| <input type="checkbox"/> LOCAL--Local Class number (field 699) | <input type="checkbox"/> OTHER--Other (2d ind. 7) |
| <input type="checkbox"/> MESH--Medical (2d ind. 2) | <input type="checkbox"/> SEARS--Sears (2d ind. 8) |
| <input type="checkbox"/> NAL--National Agriculture Library (2d ind. 3) | |

Special Instructions

(if applying for NACO authorization please provide your institution's MARC21 Organization Code)

OCoLC


May 8, 2014

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5th Screen – Add New Authorization

This is simply a Review option – you must click the Add Request button to go to the final screen


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OCLC Access & Authorization

Please review the following information. Use the [edit info](#) link to make any necessary changes. Please **DO NOT** use the browser back button to make changes.

If the following information is correct, add the request to the order by clicking on the [add request](#) button. **NOTE:** You will have an opportunity to cancel this order on the following page.

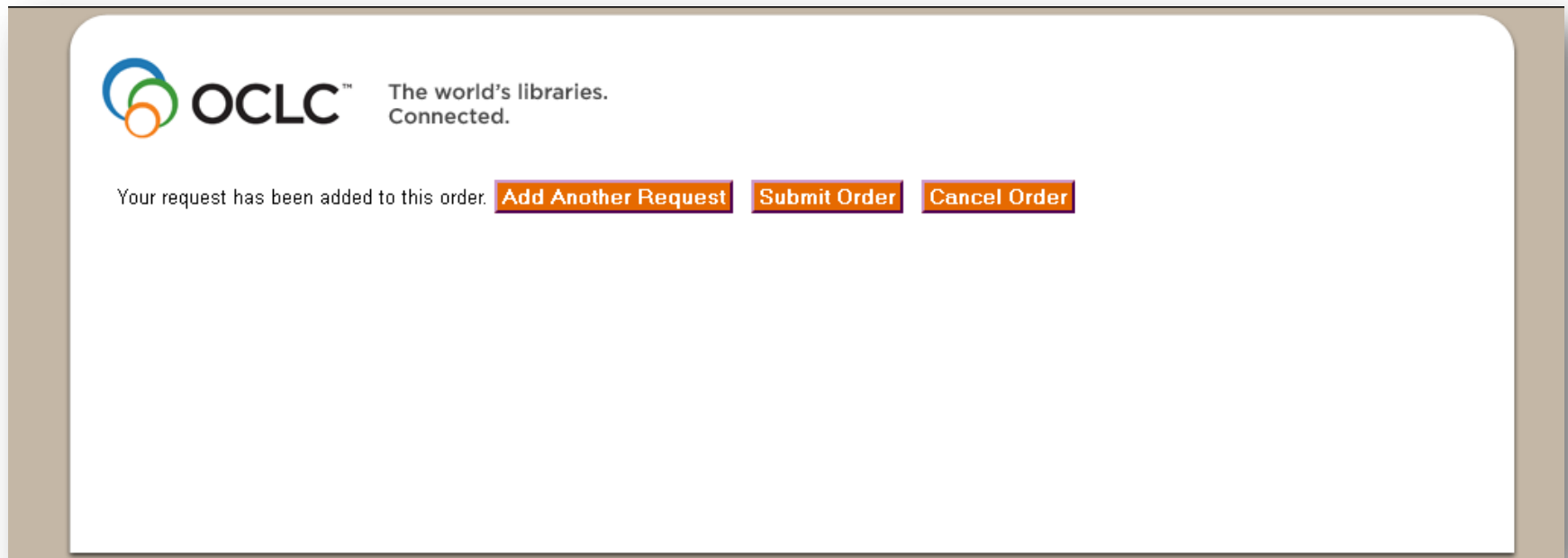
| Institution's Information | | edit info |
|---------------------------|------------------------------------|---------------------------|
| *Contact Person | Luanne Goodson | |
| *Institution Name | WorldCat Quality & Partner Content | |
| *OCLC Billing Partner | OCLC | |
| *OCLC Symbol | OCLCQ | |
| *Phone | 614-761-5274 | |
| *E-mail | goodsonl@oclc.org | |

| Add Authorization | | edit info |
|---|---|---------------------------|
| *Operator Name | Luanne Goodson | |
| *Logon Greeting | Luanne | |
| *Password | BIBCO | |
| *Default Service | Cataloging Service | |
| Cataloging Service Mode | ENN--Enhance (National) | |
| Local Holdings Maintenance Level | | |
| Authorized Formats | BKS--Books | |
| Default Classification Scheme | GOV--Government Documents (086, 074, 037) | |
| Additional Classification Schemes | - | |
| Default Subject Heading | SEARS--Sears (2d ind. 8) | |
| Additional Subject Headings | - | |
| Special Instructions (if applying for NACO authorization please provide your institution's MARC21 Organization Code) | OCoLC | |

Add Request

6th Screen – Add New Authorization

Please note: your request will
not go to OCLC *until*
Submit Order is chosen on this screen



After you choose Submit Order a confirmation screen will appear, like below – this is the **FINAL screen**. Please save an electronic version on your computer in case there should be any trouble with transmission.

OCLC Order Services staff normally turn these around in a matter of days, at which point an email is sent to the person whose contact information was included at the beginning of the form. If an email is not received after 7 business days, please send the electronic version you saved on your computer to enhance@oclc.org and we will process it from there.



Thank you for completing the OCLC Access & Authorization form. Below is the summary of the request(s) that you submitted.

Please print it out now for your records. [Print Now](#)

If you would like to complete a new request, [click here!](#)

Institution's Information

| | |
|-----------------------|-------------------|
| *Contact Person | Luanne Goodson |
| *Institution Name | OCLC, Inc. |
| *OCLC Billing Partner | OCLC |
| *OCLC Symbol | OCLCQ |
| *Phone | 614-761-5274 |
| *E-mail | goodsonl@oclc.org |

Add Authorization

| | |
|--|-------------------------------------|
| *Operator Name | National Enhance |
| *Logon Greeting | BIBCO |
| *Password | PCC |
| *Default Service | Cataloging Service |
| Cataloging Service Mode< | ENN--Enhance (National) |
| Local Holdings Maintenance Level | |
| Authorized Formats | BKS--Books |
| Default Classification Scheme | LC--Library of Congress (050, 090) |
| Additional Classification Schemes | . |
| Default Subject Heading | LC--Library of Congress (2d ind. 0) |
| Additional Subject Headings | . |
| Special Instructions (if applying for NACO authorization please provide your institution's MARC21 Organization Code) | OCLC |